**EPA Region 5 requirements for PDFs that will be used on the Web**

1. **Determine whether PDF is the appropriate format to use** to post on the Web. Use PDF if:
   - the document is longer than 5 pages
   - you need to preserve the formatting or layout of the original document
   - you need to publish a paper document for which no electronic version exists
   - you want to prevent people from modifying the document

2. **Decide whether to "chunk" large documents (optional).** Long documents such as reports with appendices are good candidates for "chunking". Consider creating multiple files, e.g., one for the executive summary, one for the report itself, and one for each appendix. "Large" documents are longer than 100 pp. or larger than 2 MB.

3. **To create a PDF** use any authoring software (Word, WordPerfect, PageMaker, etc.) and **print to Adobe Acrobat** (in Acrobat 5, print to Acrobat Distiller). Choose document conversion settings that will optimize the output for the Web (see illustration below). **Save the PDF using File > Save As**; this optimizes the file for Web and keeps the file size smaller.
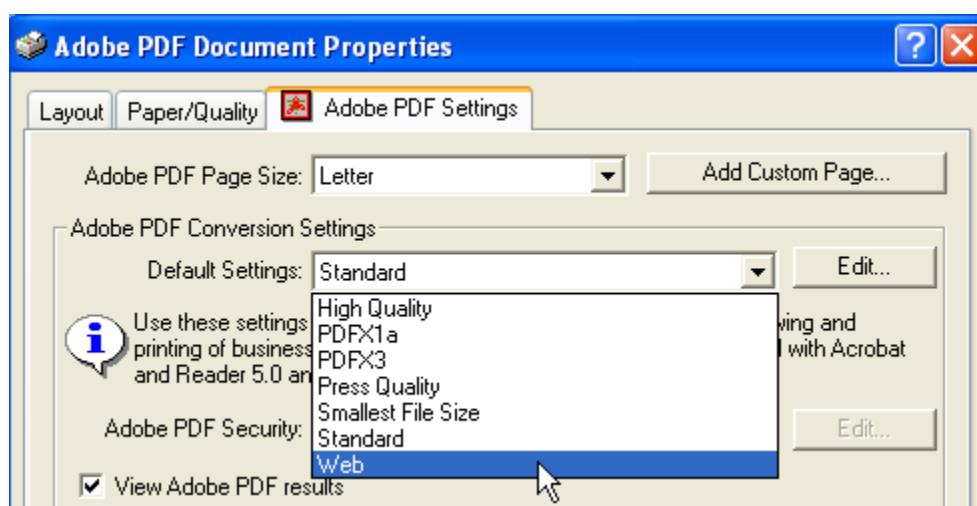
4. **Create a Document Summary. This is an EPA requirement.** Search engines (EPA's and others) use information in the Document Summary to return search results. To create the Document Summary, choose File > Document Properties > Summary (or Ctrl-D)

   - **Title:** the title of the document plus date (month and year). It may not be a filename. It should be understandable, avoiding acronyms or abbreviations that would be unfamiliar to the general public.
   - **Subject:** a short, descriptive summary of the document
   - **Author Information:** use the format: US EPA, Office/Region Name, Division Acronym. Do not use the actual name of the contractor or author.
   - **Keywords:** Use at least 2 and no more than 10. Make them specific and descriptive. Enter them as lower case; separate words with commas but no spaces: pesticides,,methods,study

   Tip: In MS-Word, you can create the Document Summary before you convert the file to PDF. Choose File > Properties > Summary tab. When you make the PDF, it will incorporate that info in the Document Summary.

5. **Create Bookmarks.** Select text and use Ctrl-B to insert a bookmark. **This is an EPA requirement for any document more than 4 pages long.**

6. **Set the Opening View to "Show Bookmarks Panel and Page"** (if you created Bookmarks).

   - Acrobat 5: File> Document Properties> Open Options, then select Bookmarks and Page.

- Acrobat 6 Standard and Professional: Ctrl-D, Initial View, Document Options, Show, Bookmarks Panel and Page.

7. **Create Web links from URLs** in text. **This is an EPA requirement.** The URLs in the document will need to start with http:// in order for this to work. Otherwise you can add links manually.

   - Acrobat 5: Tools > Locate web addresses > Create Web Links from URLs
   - Acrobat 6 Standard and Professional: Advanced > Links > Create from URLs in document. You can set link properties to determine how links will appear in the document.

8. **Specify Acrobat Reader Compatibility Version 5.0 and later.** Do not choose "Acrobat 6.0 and later", because it cannot be used by people running Windows 98. In Acrobat 6, choose: File> Reduce File Size> Compatible with: Acrobat 5.0 and later

9. **Follow EPA's PDF linking standards**, posted at epa.gov/webguide/create/link_standard.html You can link to a specific page in a PDF: <a href="path/blah/test.pdf#page=3">

Accessibility Requirements

All federal government agencies must comply with Section 508 of the Rehabilitation Act (You can learn about it at www.section508.gov). **You have three options for how to handle PDFs on the Web:**

1. **Make the PDF accessible using Adobe's Make Accessible command[1].** If you choose this option, you must check the PDF for problems that might be encountered by someone using assistive technology, and fix any accessibility errors identified. This option is best for documents with a single column of text, no text boxes, and few or no pictures.

2. **In addition to the PDF, provide the content of the PDF in an accessible format**, such as (but not limited to) HTML or plain ASCII text. If you choose this option, you need to produce an accessible version of the document which can be posted along with the PDF.

3. **In addition to the PDF, provide a contact from whom users can request an accessible version** of the document. If you choose this option, you must provide a phone number or e-mail address that a person can use to request a 508-compliant version of the document's content.

For more information, see EPA's PDF guidance page:
http://yosemite.epa.gov/OEI/webguide.nsf/design/pdf_guidance
(Note: the information in this document may be newer than the information on the Web page)

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[1] **Using Adobe's Make Accessible command.**

Acrobat 5 (install the Make Accessible plug-in found at www.adobe.com/products/acrobat): Document > Make Accessible.
Acrobat 6 Standard: Advanced > Accessibility > Make Accessible.
Acrobat 6 Professional: Advanced > Accessibility > Add Tags to Document

How to check for accessibility errors.
Acrobat 5: Tools > Accessibility Checker
Acrobat 6 Standard: Advanced > Accessibility > Quick Check
Acrobat 6 Professional: Advanced > Accessibility > Full Check (This is the best method, you will have additional options. You can also do a Quick Check. This method is less reliable.)

You can also try saving the document as text, which shows how screen readers will read the document.